

1 Charles David Tucker (Estate)**Case No. 0522981****Terry Tucker - Former Executor (pro per)****Attorney: Heather H. Kruthers (for Successor Administrator Public Administrator)****Probate Status Hearing RE: Filing of an Inventory and Appraisal and Filing of a First or Final Account**

DOD: 3/4/1994	TERRY TUCKER was appointed as Executor with full IAEA and without bond on 1/17/1995.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 1/17/1995.	
	Inventory and Appraisal was due June 1995.	Continued from 10/5/16. Minute order states Counsel is to contact Jill Spaulding.
Cont. from 042016, 050416, 061516, 072716, 100516	Creditor's claim filed on 2/14/1995 by Stephens & Bean Chapel in the amount of \$1,160.11.	
Aff.Sub.Wit.	First account or petition for final distribution was due March 1996.	1. Need Inventory and Appraisal and First or Final Account.
Verified		
Inventory		
PTC		
Not.Cred.	Minute Order dated 1/20/16 states the Court orders Terry Tucker removed as Executor and appoints the Public Administrator. Mr. Tucker reports that the home was lost to foreclosure in 1996, but there are vehicles and a business.	
Notice of Hrg		
Aff.Mail		
Aff.Pub.	Letters for the Public Administrator issued on 4/22/16.	
Sp.Ntc.		
Pers.Serv.	Status Report filed on 9/26/16 states at the last hearing on 7/27/16, the Court ordered the PA to determine if the decedent's surviving spouse, Laverne Tucker, was interested in receiving anything from this estate. The PA's office also ordered to determine what happened to the real property, since it appears to have been sold, but the former administrator, Terry Tucker, said it was not.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202	Deputy Public Administrator Scott Stacey states he was able to get the address for Laverne Tucker from Jennifer Tucker, who is the daughter of one of the decedent's three sons, Lanny Tucker. Deputy Public Administrator Stacey states Laverne Tucker lives in a secure senior complex. He went to the complex and rang her room, but she did not answer. He also sent a letter to her address asking that she call him to provide information on how the house on Lind was sold by Terry Tucker.	
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 10/25/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 1- Tucker
	Please see additional page	

Status Report filed on 9/26/16 (cont.): Deputy Public Administrator Stacey states he was told by Jennifer Tucker, who met with Laverne the afternoon after the last court appearance, that Laverne wants nothing to do with this case. She wants nothing to do with this family or the estate and just wants to be left alone.

Deputy Public Administrator Stacey states he has contacted Stewart Title several times to locate documents relating to the sale of the real property. They are unable to locate anything, stating that the sale was too long ago. The Court also recommended contacting the law office of deceased attorney David St. Louis. He attempted to do so, but the phone number is out of service.

Attorney Robyn L. Esraelian (for Petitioner Kenneth Lehman, Guardian of the Estate)

Petition for Termination of Guardianship

		KENNETH LEHMAN, father and Guardian of the Estate appointed on 11/6/2006, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Page 3</u> is the related estate of this ward's sibling.
		~Please see Petition for details~	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 10/25/16
			Updates:
			Recommendation:
			File 2- R. Lehman

Attorney Robyn L. Esraelian (for Petitioner Kenneth Lehman, Guardian of the Estate)

Petition for Termination of Guardianship

		KENNETH LEHMAN, father and Guardian of the Estate appointed on 11/6/2006, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Page 2</u> is the related estate of this ward's sibling.
		~Please see Petition for details~	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 10/25/16
			Updates:
			Recommendation:
			File 3 - A. Lehman

4A Zachary Filgas (GUARD/P)**Case No. 10CEPR00914****Attorney: Michael N. Splivalo (for Rachel Stauffer-Case – Petitioner)****Attorney: Zepure "Zeppy" Attashian (for Elaine Thomas – Guardian)****Petition for Visitation**

		RACHEL STAUFFER-CASE , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Please see related page 4B re: Kirk Filgas' (father) petition for visitation. Continued from 10/5/2016. Court ordered the Court Investigator to interview all parties, including the minor and provide a recommendation to the Court regarding whether or not unsupervised visitation should occur and also make a recommendation as to all other requests being made by the mother. Court Investigator to provide: <ul style="list-style-type: none"> Investigation report per minute order dated 10/5/2016
		ELAINE THOMAS , paternal grandmother, was appointed guardian on 8/16/2013.	
		Father: KIRK FILGAS	
Cont. from 072716, 100516			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF Reviewed on: 10/25/2016 Updates: 10/28/2016 Recommendation: File 4A- Filgas

*Please see petition for details.***4A**

4B Zachary Filgas (GUARD/P)**Case No. 10CEPR00914****Petitioner: Kirk Filgas (Pro per – Father)****Petition for Visitation**

		KIRK FILGAS , father, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Please see related page 4A re: Rachel Stauffer-Case's (mother) petition for visitation. Continued from 10/26/2016. Matter was continued to meet up with the mother's petition. The Court found service as to Elaine Thomas sufficient; the mother was still to be properly noticed. Kirk Filgas was admonished with regard to his two active warrants and one pending arrest warrant. Please see additional page.
		ELAINE THOMAS , paternal grandmother, was appointed guardian on 8/16/2013.	
Cont. from 102616		Mother: RACHEL STAUFFER-CASE	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail	x	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: SEF			
Reviewed on: 10/28/2016			
Updates:			
Recommendation:			
File 4B- Filgas			

4B

NEEDS/PROBLEMS/COMMENTS, continued:

Petitioner:

1. Need *Notice of Hearing*.
2. Need proof of service at least 15 days before the hearing of *Notice of Hearing* on:
 - a. Rachel Stauffer-Case (mother)

Court Investigator to provide:

- Investigation report per minute order dated 10/5/2016

Attorney Kara Schacher, of Paso Robles (for Esperanza S. Boone, former Administrator)

Order to Show Cause Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 6/15/2012	ESPERANZA S. BOOKE , sister, was appointed Administrator with Full IAEA authority without bond on 1/9/2013. <i>Letters</i> issued 1/16/2013.	NEEDS/PROBLEMS/COMMENTS:
Cont. from:	Pursuant to Probate Code § 8800(b) , <i>Final Inventory and Appraisal</i> was due 5/16/2013 .	
Aff.Sub.Wit.		
Verified	Inventory and Appraisal filed on 8/22/2013	
Inventory	shows an estate value of \$0.00 , indicating this is a no-asset estate opened in order to allow the personal representative to proceed with a wrongful death claim on behalf of Decedent's heirs.	
Account	X	
Not.Cred.		
Notice of Hrg		
Aff.Mail	Pursuant to Probate Code § 12200 , first account and/or petition for final distribution was due 1/16/2014 .	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Minute Order dated 8/17/2016 from the previous Status Hearing Re Filing of the First Account and/or Petition for Final Distribution states: The Court vacates the Order to Show Cause as to Kara Schacher. The Court issues an Order to Show Cause to Esperanza Brook as to why she should not be removed as Administrator for her failure to file the first and final account, or a verified status report. Esperanza Brooke is ordered to be personally present in court or present via CourtCall on 9/21/2016.	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting	Minute Order dated 9/21/2016 from the previous Status Hearing Re Filing of the First Account and/or Petition for Final Distribution states: No appearances. The Court orders Esperanza S. Boone removed as Administrator of the estate. Kara Schacher is order to be personally present or present via CourtCall on 11/2/2016.	
Status Rpt		
UCCJEA		
Citation		
FTB Notice	Clerk's Certificate of Mailing shows a copy of the Minute Order dated 9/21/2016 was mailed to Esperanza Book and to Attorney Kara Schacher on 9/21/2016.	
		Reviewed by: LEG
		Reviewed on: 10/25/16
		Updates:
		Recommendation:
		File 5 – Salinas

Petition for Settlement of Account and Approval of Trustee and Attorney Fees

Cont. from 092816, 101916		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	

NEEDS/PROBLEMS/
COMMENTS:

OFF CALENDAR

Order signed 10/27/16

Reviewed by: skc
Reviewed on: 10/25/16
Updates: 10/27/16
Recommendation:
File 6- Bailey

Petitioner Christina Williams (Pro Per, mother)

Petition for Visitation

		CHRISTINA WILIAMS, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 9/21/2016. Minute Order states Patricia Ditto [maternal grandmother] serves a copy of the petition on Sharon Robles [Guardian] in open court. Any response is to be properly filed and served. The Court makes no changes to the existing visitation orders today, and admonishes that no other parties are to attend the visits. Patricia Ditto must file her own petition for visitation, instead of Christina Williams petitioning for her.
		~Please see additional page~	
Cont. from 092116		Declaration filed by SHARON ROBLES, Guardian, on 10/24/2016.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	X	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 10/25/16
			Updates:
			Recommendation:
			File 7- Robles

Probate Status Hearing Re: Filing of the First Account

		<p>SHELIA STEARNS was appointed Conservator of the Person and Estate with bond of \$50,000.00 and \$425,000.00 to be placed into blocked accounts pursuant to Evidentiary/Settlement Conference Minute Order dated 2/25/14. The Order was signed on 3/5/14.</p> <p>On 8/13/14, bond of \$50,000.00 was filed. Thereafter, Letters were issued on 8/25/14.</p> <p>Order Increasing Bond filed 06/26/15, increased bond to \$373,717.86.</p> <p>Bond of \$373,718.00 filed 09/08/15.</p> <p>Inventory & Appraisal, partial no. 1, filed 10/28/15 - \$429,743.51</p> <p>Inventory & Appraisal, partial no. 2-Final filed 7/13/16 - \$684,950.00</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 9/7/16. Minute order states Counsel represents that the accounting is ready, however his client has not yet provided the facility statements.</p> <ol style="list-style-type: none"> Need First Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. Inventory and Appraisal, partial no. 1 filed on 10/28/15 in the amount of \$429,743.51 does not include the attachment 1 showing what was inventoried.
<p>Cont. from 102915, 011316, 022416, 042016, 051816, 062216, 080316, 090716, 100516</p>			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<p>Reviewed by: KT</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 – Cook</p>

Petition of Conservator of the Person Bryan Snavelly for Fees for Services to Conservatee and Attorney's fees and Costs

	<p>BRYAN SNAVELLY, Son and Former Co-Conservator, is Petitioner.</p> <p>Conservator: \$54,528 (for 4,544 hours @ \$12/hr; see petition for details)</p> <p>Attorney: \$16,315.50 (for services and costs from 1/6/15 – present, per petition and declaration)</p> <p>Petitioner states he was temporary co-conservator from 2/11/13 – 5/23/13 with his brother Brad Snavelly and together they were appointed co-permanent conservators of the person and served in that capacity until 10/28/15, at which time they both resigned to allow the appointment of the Public Guardian in their stead.</p> <p>Petitioner was originally represented by Attorney J. Stanley Teixeira, who handled the petitions for temporary and permanent conservatorship of the person. The Conservatee was represented by Attorney Gary Bagdasarian, who was appointed by the Court on 2/11/14.</p> <p>Petitioner provides history including the Conservatee losing his wife in May 2011, and states pursuant to a family agreement, Petitioner agreed to sell his home in Northern California to live with Conservatee at his home in Caruthers. Petitioner obtained a transfer to Hanford and moved into Conservatee's home in January 2014. Petitioner's wife Betsey continued to live in Northern California until escrow closed on the sale of their home, and came to Caruthers as often as she could to assist. She finally moved in with Petitioner and Conservatee in May 2014, and gave up her full-time job to assist Petitioner with caring for the Conservatee.</p> <p>When Petitioner first moved in, he confronted an extraordinary mess. Conservatee had not cleaned the home in years. The bathroom was covered in mold and all rooms were filthy. Tools, clothing, dishes and food were scattered about and the kitchen was a wreck. SEE ADDITIONAL PAGES.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Former Conservator Bruce Bickel's Amended First and Final Account is set for <u>11/15/16</u>, along with the related Amended First and Final Account of the Robert and Julietta Snavelly Trust in 16CEPR00623.</p>
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input checked="" type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 10/27/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 9- Snavelly</p>

Page 2 – Petitioner states he began the job of cleaning the house and yard, and his wife helped as well. Due to the conservatee's insistence that his funds not be used to hire any help, Petitioner and his wife did the cleanup work themselves. After several weeks, the home was safe, clean, and livable again. Thereafter, Petitioner began cleaning the yard and outbuildings. He installed security cameras at the Conservatee's request. The Conservatee was concerned about theft, but would not hire a professional company to do the installation.

Petitioner provided other services to the Conservatee with his wife's assistance including shopping, cooking cleaning, maintaining the yard and outbuildings. He and his wife paid for all groceries and household supplies and treated the Conservatee to frequent outings. Petitioner provided daily care for the Conservatee including managing his diabetes medications and diet as directed by his doctor. Under Petitioner's care, the Conservatee was able to reduce and eventually eliminate his need for diabetes medication. Petitioner also helped Conservatee with various projects around the property. The Conservatee was unable to drive, so Petitioner and his wife provided all transportation.

Shortly after moving in, Petitioner began the process of obtaining conservatorship, which process the Conservatee resisted, and there were some disagreements with Petitioner's brother as well. Eventually they agreed to serve as co-conservators; however, the Conservatee retained the right to make medical decisions for himself.

Along with getting the house and grounds in order, Petitioner also had to sort through the huge amount of mail that had accumulated, and assist with regular payment of bills. In the process, Petitioner began to understand that the Conservatee had been transferring assets out of his personal trust, failing to collect rent from his commercial tenant, and hoarding large amounts of cash in the house. He also discovered a recent spate of extremely risky investments. Petitioner was able to prevent foreclosure of the Conservatee's home when he discovered that payments had been neglected on a time share that he had purchased without telling anyone.

Petitioner states when Conservatee realized that Petitioner had become aware of his recent investments and was concerned that he was being taken advantage of by scams or unscrupulous investment advisors, the Conservatee became secretive about his financial dealings. He insisted he knew what he was doing and did not need help making such decisions.

Petitioner retained Attorney Catherine A. Amador in December 2014 to seek appointment as conservator of his father's estate, which the Conservatee resisted vigorously. The problem was temporarily resolved when the Conservatee himself appointed Professional Fiduciary Bruce Bickel as successor trustee of his trust and indicated his intention to allow Mr. Bickel to manage his personal finances. Unfortunately, he failed to cooperate with Mr. Bickel. As the summer of 2015 progressed, it became increasingly clear that the Conservatee was no longer able to manage his own health care properly. He switched physicians because he was determined to regain his driver's license. He refused to allow Petitioner to talk with his new doctor, making it difficult to ensure that he was following his medication regime. Therefore, Petitioner filed a petition for exclusive authority to make medical decisions for him on 9/17/15.

SEE ADDITIONAL PAGES

Page 3 – Petitioner states at this time, strong disagreement developed between Petitioner and his brother, co-conservator Bradley Snavely, regarding the level of care the Conservatee needed. This inflamed the conservatee's own frustration with the situation and he became less and less willing to cooperate with Petitioner and his wife. In addition, the Conservatee became obsessed with the desire to drive again and have control over all of his vehicles. On one occasion, he drove into town and only stopped when he ran out of gas. A neighbor alerted Petitioner to the situation. Petitioner tried to keep the keys locked away, but the Conservatee had at least one vehicle and his shop re-keyed and then refused to give Petitioner the new keys. Petitioner had to monitor more closely thereafter to ensure he did not drive and that he was working safely in his shop, due to the Conservatee hiding from Petitioner.

Petitioner was also negotiating with his brother to reach common ground to move forward to provide care. Unfortunately, they had vastly different opinions.

Concurrently, Mr. Bickel was becoming increasingly convinced that he could not successfully serve as trustee and conservator of the estate because the Conservatee was not cooperating with him. The parties agreed it was best that all current conservators resign and the Public Guardian be appointed as conservator of the person and estate and as trustee of the conservatee's personal trust.

At hearing on 10/28/15, the Court agreed, accepted the resignations, and appointed the Public Guardian as conservator of the person and estate, with medical consent powers.

Mr. Bickel filed a partial inventory on 11/18/15 and a second partial inventory on 1/11/16. He and the PG cooperated with management of the conservatee's assets thereafter as it remained necessary for him to present a formal petition to be removed from the trust. They agreed that the end date for his account on the conservatorship would be 1/12/16, at which time he had completed transfer of all conservatorship accounts and assets to the PG. The Court accepted this plan.

On 6/14/16, Mr. Bickel filed his first and Final Accounts within the conservatorship and trust matters, and at status hearing on 6/15/16, confirmed to the court that he had inventoried all assets he had been able to marshal and was not aware of additional conservatorship estate assets. However, the PG has yet to file its own inventory following Mr. Bickel's surrender of assets he had marshalled for both estate and trust.

Thereafter, Petitioner and his attorney spent additional time assisting the PG by providing information re the conservatee's home, caregivers, personal needs and habits, and medical condition.

Petitioner asserts that \$12/hr is a reasonable hourly rate for his time spent caring for the Conservatee including personal care, maintenance of the large home and grounds, and transportation. Petitioner did not anticipate the need to do this, as the agreement with his father and his brother at the time he moved to Caruthers was that he would be given the lease of the Conservatee's almond orchard. Thus, he expected to have income from farming the orchard in exchange for providing full-time care for the Conservatee. However, the Conservatee refused to allow Petitioner to have the lease, due to his frustration that others were exerting control over his life, and he focused his frustration on Petitioner and his wife, eventually becoming physically violent towards Betsy.

SEE ADDITIONAL PAGES

Page 4 – Petitioner states ultimately the situation became untenable and decision was made to appoint the Public Guardian and change to paid caregivers.

As an alternative, Petitioner believes a fair estimate of the total time he spent providing services to the Conservatee can be derived from the number of hours of caregiver time the PG determined was necessary at Petitioner's resignation and replacement caregivers were hired, which was a minimum of 8 hours per day to ensure 3 healthy meals, assistance with medication, transportation, etc. The cost for Comfort Keepers was over \$4,500/month to provide this level of care, and this did not include groceries and household supplies, housekeeping, yard maintenance.

By comparison, Petitioner worked 15 hours/day immediately after he moved in with the Conservatee, cleaning the property and addressing the financial situation. Thereafter, the conservatee's personal care needs decreased, but gradually increased as time went by. Petitioner continued to care for the large yard and maintain the house, provide transportation, etc. Petitioner asserts that on average, he provided 8 hours of care per day to the Conservatee.

Petitioner and his wife provided care for 20 months from 1/1/14 – 9/30/15. During that time, they took five weeks of vacation. Petitioner's brother also provided an additional 5 days of respite care. Petitioner calculates fees as follows:

1/1/14 – 9/30/15 is 608 days, reduced for vacation, etc., is 568 days.
568 days x 8 hours/day = 4,544 hours
4,544 hours @ \$12/hr = \$54,528.

This amounts to \$2,726.40/month, and includes expense of groceries, household supplies, housekeeping, yard work, maintenance, transportation, and does not include Betsy's time.

Petitioner states he has incurred \$14,889 in attorney's fees including time to prepare this petition, and \$1,014 in allowable costs. He anticipates incurring an additional 1.5 hours for appearance and \$435 for the filing fee. (See Declaration of Catherine A. Amador in Support of Petition for Attorney's Fees and Costs for itemization.)

Petitioner requests the Court approve this petition and direct payment of \$54,528 to Petitioner and \$16,315.50 to Pascuzzi, Pascuzzi & Stoker, either from the Conservatorship or from the Conservatee's trust, and such further orders as it deems necessary and proper.

Objections filed 10/25/16 by Public Guardian, current conservator, state nowhere in the petition does Petitioner account for the fact that he lived with his father rent-free. In fact, he and his wife sold their home, so they did not have a mortgage of their own to pay. The PG requests that the Court consider the lack of rent paid when determining the fees of Bryan Snavelly should he be paid.

Second and Final Report of Administration, petition for Mileage Reimbursement, Reimbursement of Cash Advances, for Statutory and Extraordinary Commissions and Fees to Executor and Attorney and for Final Distribution.

DOD: 7/14/14		RAYE GRANT , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 12/16/15 – 9/1/16	
Cont. from 101916		Accounting - \$203,179.60	
		Beginning POH - \$114,660.43	
Aff.Sub.Wit.		Ending POH - \$ 73,143.32	Note: Pursuant to Local Rule 7/12/6 the Court will set a Status Hearing as follows:
✓	Verified		
✓	Inventory	Executor - \$4,161.87	
✓	PTC	(statutory)	
✓	Not.Cred.	Executor x/o - \$396.00	• Wednesday, May 24, 2017 at 9:00 a.m. in Dept. 303 for an Informal Accounting of the \$5,000.00 Closing Reserve.
✓	Notice of Hrg	(mileage for sale of real property 720 miles @ \$.55 per mile)	
✓	Aff.Mail	Executor Reimbursement - \$21,336.86	Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. Filing of the informal accounting of closing reserve will not generate a new hearing date.
	W/	(for personal funds used in the administration of the estate prior to the sale of the real property.)	
Aff.Pub.			
Sp.Ntc.		Attorney - \$4,161.87	
Pers.Serv.		(statutory)	
Conf. Screen		Attorney x/o - \$2,700.00	
✓	Letters	(sale of real property, per itemization 13.5 hrs @ \$200 per hour.)	
	10/16/14		
Duties/Supp			
Objections		Closing reserve - \$5,000.00	
Video Receipt			
CI Report		Proposed distribution, pursuant to Decedent's Will, is to:	
✓	9202	Russell Reed - \$7,077.34	
✓	Order	Robyn Dunn - \$3,538.68	
		Diane Tompkins - \$7,077.34	
	Aff. Posting	Austin Rowley - \$7,077.34	Reviewed by: KT
	Status Rpt	April Bezona - \$1,769.34	Reviewed on: 10/25/16
	UCCJEA	Adam Richardson - \$1,769.34	Updates:
	Citation	Sierra View Church - \$7,077.34	Recommendation:
✓	FTB Notice		File 10- Rowley

11 Mildred Frances Hicks (Estate)**Case No. 15CEPR00196****Attorney: Heather H. Kruthers (for the Public Administrator)****Attorney: Gary Winter (for Objectors Derek Hicks, Helen Hicks and Lelon Hicks)****First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees; for Instruction Regarding Payment of Claims and for Distribution.**

DOD: 9/22/12		PUBLIC ADMINISTRATOR , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Gary Winter filed a creditor's claim for fees in his representation of Derek Hicks, Helen Hicks and Lelon Hicks in the amount of \$6,467.74. There does not appear to be any provision in the Probate Code for the filing of a creditor's claim against the beneficiaries in an estate. 2. Creditor's Claim of Gary Winters for payment of attorney fees for his clients, Derek Hicks, Helen Hicks and Lelon Hicks is \$6,467.74. Petition includes payment of attorney fees to Gary Winter on behalf of Derek Hicks, Helen Hicks and Lelon Hicks in the amount of \$11,722.70 and in the order totals \$13,122.71. Need Clarification. 3. Petition states Derek Hicks, Helen Hicks and Lelon Hicks have agreed that Mr. Winter's fees can be paid from their share of the estate. However said agreements have not been filed. Please see additional page
		Account period: 5/19/15 – 8/13/16	
Cont. from		Accounting - \$120,000.00	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$120,000.00	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$103,984.90	
<input checked="" type="checkbox"/>	Inventory	Attorney (statutory) - \$4,600.00	
<input checked="" type="checkbox"/>	PTC	Attorney x/o - \$1,000.00	
<input checked="" type="checkbox"/>	Not.Cred.	(for sale of real property)	
<input checked="" type="checkbox"/>	Notice of Hrg	Administrator (statutory) - \$4,600.00	
<input checked="" type="checkbox"/>	Aff.Mail	Administrator x/o - \$1,248.00	
	Aff.Pub.	(sale of real property and taxes)	
	Sp.Ntc.	Lawvex (Gary Winter)- ????	
	Pers.Serv.		
	Conf. Screen	Bond fee - \$375.00	
<input checked="" type="checkbox"/>	Letters 11/16/15	(o.k.)	
	Duties/Supp	Costs - \$546.00	
<input checked="" type="checkbox"/>	Objections	(filing fees, certified copies)	
	Video Receipt	Closing - \$2,000.00	
	CI Report		
<input checked="" type="checkbox"/>	9202	Please see additional page	
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on: 10/25/16
Updates: 10/27/16
Recommendation:
File 11- Hicks

4. Petition states David Hicks has made a claim through his attorney Lisa Horton for reimbursement of \$21,647.45. Ms. Kruthers told Ms. Horton and Mr. Winter that she will advise the PA to reimburse David Hicks $\frac{3}{4}$ of what he paid for the following expenses 1) property insurance, 2) recording fees/costs, 3) property taxes and 4) estate administration fees. The attorneys understand that the PA is seeking the Court's instructions as to the other amounts to be reimbursed to Mr. Hicks. It appears that Mr. Hicks should be reimbursed 100% of the costs allowed by the court.
5. Petition states the original petition for probate listed Norchelle Hicks as a daughter. However, through a review of legal documents, the PA determined that Norchelle was never adopted by the decedent, but rather was given the care and custody of her. Petition alleges Norchelle will be given notice of the account and petition. No proof of service has been filed showing Norchelle has been noticed of this hearing.

The initial petitioner in this matter was David Hicks, represented by Lisa Horton.

A competing petition was filed by Derek Hicks, Helen Hicks and Lelon Hicks, represented by Gary Winters.

The Court found the dispute between the parties was so severe that neither could be appointed and therefore appointed the Public Administrator.

Proposed distribution pursuant to intestate succession is to:

Derek Hicks $\frac{1}{4}$
Lelon Hicks $\frac{1}{4}$
Helen Hicks $\frac{1}{4}$
David Hicks $\frac{1}{4}$

Objections to First and Final Account and Report of Administrator Re: Reimbursements filed by Derek Hicks, Helen Hicks and Lelon Hicks on 10/25/16 states they have no objections to the Administrator's position to pay $\frac{3}{4}$ of the costs for property insurance, recording fees/costs, property taxes and estate administration fees. Objectors do object to the remaining reimbursements requested.

Objectors object to requests for reimbursements prior to May 19, 2015 as inappropriate acts of an individual who was either in possession of estate property when those expenses were incurred or received the benefit of that possession himself by renting the Estate property to others.

Objectors object to requests for reimbursement after May 19, 2015 as lacking legal authority, usurping the Administrator's Court appointed authority as an individual who was not authorized to act on behalf of the Estate, after the Court had denied his petition to be the Administrator. Amy acts after May 19, 2015 should have been solely coordinated with and through the Administrator.

Objectors generally object to David's request for reimbursement as improper for a beneficiary or characterizations of creditor's claims under the creditor's claim procedure under Probate Code §9000 et seq. David could have filed a creditor's claim up to 4 months after November 16, 2015, which has March 16, 2016 and timely included his request in the Estate process. David failed to file a creditor's claim within the time period allowed by law.

Please see additional page

Dept. 303, 9:00 a.m. Wednesday, November 2, 2016

Declaration of David Hicks Re: Request for Reimbursement of Costs filed on 10/27/16. David Hicks states the Public Administrator has already agreed to reimburse him for the real property insurance, real property taxes, recording fees and costs and the estate administration fees that he has advanced. There were other costs requested for reimbursement that directly benefited the estate.

- a) Abstract of Judgment was recorded as a lien against the real property. The lien would have been required to be paid through escrow. Mr. Hicks requests reimbursement of the lien in the sum of \$2,704.23 (3/4 of the total amount).
- b) Allied Waste for Dumpsters to Clean out Decedent's residence. Mr. Hicks says their mother was a hoarder. He spent numerous hours cleaning out the house without any help from his siblings. The PA would have had to do the same thing, as the home could not be sold without cleaning it out. Having him do it saved the estate a lot of money. He requests reimbursement in the sum of \$941.43 (3/4 of the total amount).
- c) Real Property Repair and Maintenance. Due to neglect and hoarding by their mother, her house was not in good condition. There was a major roof leak in the back bedroom. The damage could have gotten significantly worse had he not had the roof repaired in 2014. The other items listed were for fixing the broken windows, and doors when people broke in and vandalized the residence. All were done to the advantage and benefit of the estate as it increased the house value and prevented further irreparable harm. He requests reimbursement in the sum of \$5,808.51 (3/4 of the amount paid).

The above expenditures were reasonable under the circumstances, paid in good faith and directly benefited the estate and his siblings. Mr. Hicks humbly requests that the Court reimburse him the total sum of \$9,454.16.

Probate Status Hearing RE: Filing of the First Account

		<p>MOISES RUSSELL RUIZ, son, was appointed conservator of the person and estate on 6/3/2015 with bond of \$146,300.</p> <p>Letters issued 6/9/2015.</p> <p>Final I&A was filed 12/10/2015 showing an estate value of \$302,387.90.</p> <p>Minute order dated 6/3/2016 set status hearing for filing the first account.</p> <p>Minute order dated 9/7/2016 stated counsel represents the Conservatee is now deceased, so he is now working on the two part accounting. Matter was continued to 10/5/2016.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 10/5/2016. Counsel requests 30 days.</p> <p>As of 10/25/2016, no new documents filed and the following issues still exist:</p> <ol style="list-style-type: none"> Need accounting or current written status report pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the status report shall be served on all necessary parties.
Cont. from 090716, 100516			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	x		
UCCJEA			
Citation			
FTB Notice			

Reviewed by: SEF
Reviewed on: 10/25/2016
Updates:
Recommendation:
File 12- Ruiz

Probate Status Hearing Re: Filing First Account/Final Distribution

DOD: 4/26/11	CAROLYN M. FURHMANN was appointed Executor without bond and with full IAEA authority on 9/3/15.	NEEDS/PROBLEMS/COMMENTS: 3. Need First Account and/or Petition for Distribution.
	Letters issued on 9/4/15.	
Cont. from	Inventory and Appraisal showing the estate valued at \$152,000.00 was filed on 10/13/16.	
Aff.Sub.Wit.	Minute order dated 9/3/15 set this status hearing for the filing of the first account and/or petition for final distribution.	
Verified		
Inventory	Status Report filed on 10/21/16 states Petitioner is exploring what is believed to be an outstanding note receivable. Once the status of the note is confirmed, Petitioner will file a supplementary inventory and appraisal if needed.	
PTC		
Not.Cred.	Decedent's son, Ronald Zinders, survived him, but passed way prior to the establishment of his father's estate. Petitioner is working with Ronald's heirs to determine the most effective way to distribute his estate share.	
Notice of Hrg		
Aff.Mail	The estate is not in a condition to close.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 10/25/16
		Updates:
		Recommendation:
		File 13- Zindars

Probate Status Hearing Re: the Filing of the First Account and/or Petition for Final Distribution

DOD: 8/14/14	BEVERLY H. LEACH , spouse, was appointed Executor with full IAEA and without bond on 09/01/15.	NEEDS/PROBLEMS/COMMENTS: Note: Kenton J. Klassen substituted in as attorney of record for Thomas L. McCormick on 9/30/16. 4. Need First Account and/or Petition for Distribution.
	Letters issued on 9/11/15.	
Cont. from		
Aff.Sub.Wit.	Inventory and appraisal showing the estate valued at \$254,821.04 was filed on 2/19/16.	
Verified		
Inventory		
PTC		
Not.Cred.	Minute order dated 9/1/15 set this status hearing for the filing of the first account and/or petition for final distribution.	
Notice of Hrg		
Aff.Mail	Minute order dated 3/30/16 for Order to Show Cause for Failure to File the Inventory and Appraisal, states the parties are reminded of the 11/2/16 hearing for the filing of the closing petition; Ms. Leach is to be present in court or via CourtCall on that date if the petition has not been filed.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	Status Report filed on 10/27/16 states there will be a correction to the inventory and appraisal. Petitioner requests that the status hearing be continued for an additional 30 days to allow Petitioner sufficient time to file the First Account.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT Reviewed on: 10/25/16 Updates: 10/28/16 Recommendation: File 14- Leach

Probate Status Hearing RE: Filing of the First Account and/or Petition for Final Distribution.

DOD: 4/3/15	<p>LINDA MCCLOUD was appointed as Administrator with Will Annexed, with full IAEA and bond set at \$1,883,274.00 on 10/6/15.</p> <p>Bond filed on 10/22/15.</p> <p>Letters issued on 10/22/15.</p> <p>Inventory and appraisal showing the estate valued at \$1,412,217.24 filed on 2/9/16.</p> <p>Minute order dated 10/6/15 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>5. Need First Account and/or Petition for Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: KT</p> <p>Reviewed on: 10/25/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15- McCloud</p>		

Attorney Edward R. Ramirez (for Petitioner Giuliano DiCicco, Executor)

First and Final Account of Administrator and Petition for Its Settlement, for Allowance of Compensation for Ordinary and Extraordinary Services for Administrator and Attorney and for Final Distribution

DOD: 7/15/2015	GIULIANO DICICCO , son-in-law and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 7/22/2015 – 9/20/2016	
	Accounting - \$291,015.45	
Cont. from	Beginning POH - \$277,500.00	
Aff.Sub.Wit.	Ending POH - \$ 70,686.88 (\$68,186.88 is cash)	
✓ Verified		
✓ Inventory	Executor - \$8,550.00 (statutory)	
✓ PTC		
✓ Not.Cred.	Executor X/O - \$1,000.00 (per Local Rule for sale of real property)	
✓ Notice of Hrg		
✓ Aff.Mail w/o	Executor Expenses - \$13,515.45 (Declaration Re Itemization of Expenses filed 10/27/2016, for real property repairs and readying for sale; filing fees; certified copies;)	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Attorney - \$8,550.00 (statutory)	
Conf. Screen		
Letters 110215	Attorney X/O - \$1,000.00 (per Local Rule for court-confirmed sale of real property)	
Duties/Supp		
Objections		
Video Receipt	Creditors' Claims - \$784.62 (to be paid to Crystal Pool Service @ \$552.62; and to Acute Pest Control @ \$232.00;)	
CI Report		
✓ 9202	Distribution pursuant to Decedent's Will is to:	
✓ Order	<ul style="list-style-type: none"> • NINON NICHOLAS STAMOULIS TURNER – \$100.00 cash; • TERESA YRIBARREN – Lincoln Towncar and \$1,000.00 cash; • EVANGELIA NIKKI STAMOULIS DiCICCO – \$33,686.81 cash. 	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
✓ FTB Notice		
		Reviewed by: LEG
		Reviewed on: 10/26/16
		Updates: 10/28/16
		Recommendation:
		File 16- Stamoulis

17A

Clarence Jesse Bennett (Estate)

Case No. 15CEPR00816

Attorney

Janet L. Wright (for Petitioner Juanita Bennett, spouse)

Attorney

William J. Keeler, of Portland, Oregon (also for Petitioner Juanita Bennett, spouse)

Attorney

Kurt F. Vote; Scott D. Laird; Dylan J. Crobby, for Objector G. Dana French, Personal Representative of the Estate of Clarence Jesse Bennett)

Attorney

B. Howard Pearson, of Stanford (for Board of Trustees of Leland Stanford Jr. University, Remainder Beneficiary of the C.J. Bennett Family Trust of 1987)

Petition for Payment of Family Allowance

DOD: 6/26/2015		JUANITA BENNETT , surviving spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Page 9B</u> is a Probate Status Hearing Re: Setting of a Contested Hearing. <u>Continued from 8/31/2016.</u> Note: Probate Status Hearing for filing of the first and/or final account is set on <u>11/30/2016</u> .		
Cont. from 052516, 083116		<i>~Please see Petition for details~</i> Amendment to Petition for Payment of Family Allowance filed 5/11/2016.			
	Aff.Sub.Wit.			Verified Objection to Petition for Payment of Family Allowance filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/13/2016.	
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				Request for Judicial Notice in Support of Verified Objection to Petition for Payment of Family Allowance filed 5/13/2016.
✓	Aff.Mail	W/			Verified Objection to Amendment to Petition for Payment of Family Allowance filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/20/2016.
	Aff.Pub.				Memorandum of Points and Authorities in Support of Verified Objection to Amendment to Petition for Payment of Family Allowance was filed by Respondent, the Estate of Clarence J. "Peter" Bennett, by and through its Personal Representative G. Dana French on 5/20/2016.
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters				
	Duties/Supp				
✓	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
			Reviewed by: LEG		
			Reviewed on: 10/25/16		
			Updates:		
			Recommendation:		
			File 17A- Bennett		

17A

Attorney Janet L. Wright (for Petitioner Juanita Bennett, spouse)
 Attorney William J. Keeler, of Portland, Oregon (also for Petitioner Juanita Bennett, spouse)
 Attorney Kurt F. Vote; Scott D. Laird; Dylan J. Crobby (for Objector G. Dana French, Personal Representative of the Estate of Clarence Jesse Bennett)
 Attorney B. Howard Pearson, of Stanford (for Board of Trustees of Leland Stanford Jr. University, Remainder Beneficiary of the C.J. Bennett Family Trust of 1987)

Probate Status Hearing Re: Setting of a Contested Hearing

DOD: 6/26/2015	JUANITA BENNETT , surviving spouse filed a <i>Petition for Payment of Family Allowance</i> on 4/12/2016, with an <i>Amendment to Petition</i> filed 5/11/2016.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 8/31/2016.</u> The following issue from the last hearing remains: 1. Need verified status report from counsel for the opposing parties, and proof of service of notice of the status hearing pursuant to Local Rule 7.5(B), which provides that in all matters set for Status Hearing, a verified Status Report must be filed no later than 10 days before the hearing; notice of the status hearing with a copy of the Status Report shall be served on all necessary parties.										
Cont. from 083116	G. DANA FRENCH , Executor of the Estate, filed a <i>Verified Objection to Petition for Payment of Family Allowance</i> on 5/13/2015, and a <i>Verified Objection to Amendment to Petition</i> on 5/20/2016.											
Aff.Sub.Wit.		<table border="1"> <tr><td>Reviewed by:</td><td>LEG</td></tr> <tr><td>Reviewed on:</td><td>10/25/16</td></tr> <tr><td>Updates:</td><td></td></tr> <tr><td>Recommendation:</td><td></td></tr> <tr><td>File</td><td>17B- Bennett</td></tr> </table>	Reviewed by:	LEG	Reviewed on:	10/25/16	Updates:		Recommendation:		File	17B- Bennett
Reviewed by:	LEG											
Reviewed on:	10/25/16											
Updates:												
Recommendation:												
File	17B- Bennett											
Verified												
Inventory												
PTC												
Not.Cred.												
Notice of Hrg	X											
Aff.Mail	X											
Aff.Pub.												
Sp.Ntc.												
Pers.Serv.												
Conf. Screen												
Letters												
Duties/Supp												
Objections												
Video Receipt												
CI Report												
9202												
Order												
Aff. Posting												
Status Rpt	X											
UCCJEA												
Citation												
FTB Notice												

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 3/31/2016	KELLEY YOUNGS , daughter, was appointed Administrator with full IAEA without bond.		NEEDS/PROBLEMS/COMMENTS:
			1. Need inventory and appraisal or current written status report pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the status report shall be served on all necessary parties.
	<i>Letters issued 6/2/2016.</i>		
Cont. from	Minute order dated 6/1/2016 set this status hearing re: the filing of the inventory and appraisal.		Reviewed by: SEF Reviewed on: 10;/25/2016 Updates: Recommendation: File 18- McCrystyn
Aff.Sub.Wit.			
Verified			
Inventory		x	
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt		x	
UCCJEA			
Citation			
FTB Notice			

First Amended Petition to Determine Succession to Real Property

DOD: 11/15/2009		Petitioners are:	NEEDS/PROBLEMS/COMMENTS:
		ROY CARDENAS (son)	
		JUAN G. CARDENAS (son)	
		AURELIA M. LANGFORD (daughter)	
		JUAN MANUEL CARDOZA (son)	
		JOSE LUIS CARDOZA (son)	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	40 days since DOD	
<input checked="" type="checkbox"/>	Inventory	No other proceedings	
<input checked="" type="checkbox"/>	PTC	I&A - \$85,000.00	
<input type="checkbox"/>	Not.Cred.	Decedent died intestate	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioners request Court determination that	
<input checked="" type="checkbox"/>	Aff.Mail	located at 276 E. Hawthorne Avenue,	
		Coalinga CA pass to them in equal 20%	
		shares pursuant to intestate succession.	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 10/25/2016
			Updates:
			Recommendation: SUBMITTED
			File 19- Cardenas

Petitioner: Berta Isabel Ochoa Castro (Pro per – Mother)

Petition for Visitation

		BERTA ISABEL OCHOA CASTRO , mother, is petitioner JOSEFINA CASTRO MENDOZA and BENITO MENDOZA , maternal grandmother and step-grandfather were appointed co-guardians on 9/6/2016. Father: JESSE OCHOA – <i>Please see petition for details.</i>	NEEDS/PROBLEMS/COMMENTS: 1. Need <i>Notice of Hearing</i> . 2. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> on: a. Josefina Castro Mendoza (guardian) b. Benito Mendoza (guardian) c. Jesse Ochoa (father)	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: SEF Reviewed on: 10/26/2016 Updates: Recommendation: File 20- Ochoa	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

		ANGELA WILBANKS ANDERSON and ROBERT C. WILBANKS were appointed co-conservators with bond set at \$148,500 on 7/18/16. Bond filed on 7/6/16. Letters issued on 7/22/16. Minute order dated 7/6/16 set this status hearing for the filing of the inventory and appraisal.	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Inventory and Appraisal filed on 10/27/16.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 10/27/16
			Updates: 10/28/16
			Recommendation:
			File 21- Wilbanks

Probate Status Hearing RE: Proof of Bond

Age:			NEEDS/PROBLEMS/COMMENTS:
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		<u>OFF CALENDAR</u> Bond filed 10/24/16	
		Reviewed by: skc	
		Reviewed on: 10/26/16	
		Updates:	
		Recommendation:	
		File 22- Green	

Petition for Appointment of Guardian of the Person

		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		KIMIKA DELONEY , paternal grandmother, is petitioner	
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.	x	
	Notice of Hrg	x	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		<i>Please see petition for details.</i>	1. Need <i>Notice of Hearing</i> . 2. Need proof of personal service at least 15 days before the hearing of the <i>Notice of Hearing</i> <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: a. Donald R. Phelps (father) b. Rachel Morris (mother) 3. Need proof of service at least 15 days before the hearing of the <i>Notice of Hearing</i> <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: a. Donald Phelps Sr. (paternal grandfather) b. Cecil Morris (maternal grandfather) c. Maternal grandmother
			Reviewed by: SEF
			Reviewed on: 10/26/2016
			Updates:
			Recommendation:
			File 23- Phelps

Petitioner

Bamping, Brian Clayton (Pro Per – Paternal Great – Uncle – Petitioner)

Petitioner

Bamping, Tina Marie (Pro Per – Paternal – Great-Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. If diligence is not found, need notice to maternal grandparents pursuant to Probate Code §1511 or further diligence.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 10/26/16	
			Updates:	
			Recommendation:	
			File 24- Wright	

Petition for Appointment of Guardian of the Person a

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 2. If diligence is not found, need notice to both fathers and paternal grandparents pursuant to Probate Code §1511 or further diligence.
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>		
✓	Verified	<input type="checkbox"/>		
<input type="checkbox"/>	Inventory	<input type="checkbox"/>		
<input type="checkbox"/>	PTC	<input type="checkbox"/>		
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>		
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>		
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>		
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>		
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>		
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>		
✓	Conf. Screen	<input type="checkbox"/>		
✓	Letters	<input type="checkbox"/>		
✓	Duties/Supp	<input type="checkbox"/>		
<input type="checkbox"/>	Objections	<input type="checkbox"/>		
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>		
✓	CI Report	<input type="checkbox"/>		
✓	Clearances	<input type="checkbox"/>		
<input type="checkbox"/>	Order	<input type="checkbox"/>		
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>		
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>		
✓	UCCJEA	<input type="checkbox"/>		
<input type="checkbox"/>	Citation	<input type="checkbox"/>		
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>		
			Reviewed by: skc	
			Reviewed on: 10/26/16	
			Updates:	
			Recommendation:	
			File 25- Edwards & Hannah	

Petition to Determine Succession to Real Property

DOD: 3/21/16		<p>AMELIA GUTIERREZ, Spouse, along with SAM GUTIERREZ, MONIKA PETRILLE, and RANDALL GUTIERREZ, adult children, are Petitioners.</p> <p>40 days since DOD</p> <p>No other proceedings</p> <p>I&A: \$87,000.00 (An undivided 60% interest in real property in Sanger)</p> <p>Decedent died intestate</p> <p>Petitioners request Court determination that the decedent's 60% interest in the Sanger real property passes to them as follows:</p> <p>Amelia Gutierrez: A 20% interest in the decedent's 60% interest</p> <p>Sam Gutierrez: A 13.33% interest in the decedent's 60% interest</p> <p>Monika Petrille: A 13.34% interest in the decedent's 60% interest</p> <p>Randall Gutierrez: A 13.33% interest in the decedent's 60% interest</p>	NEEDS/PROBLEMS/COMMENTS:	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: skc
Reviewed on: 10/26/16
Updates:
Recommendation: SUBMITTED
File 26- Gutierrez

Petition for Probate of Will and for letters Testamentary; Authorization to Administer Under the IAEA

DOD: 4/16/15			NANCY RAMOS , Named Executor without bond, is Petitioner. Full IAEA – ok Will dated 4/9/13 Residence: Fresno Publication: Business Journal Estimated value of estate: Annual income from real property: \$21,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner does not include herself in the list at #8, which should set forth her relationship to the decedent and address. Need declaration setting forth this information. <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> Wednesday, April 5, 2017 for filing the Inventory and Appraisal Wednesday, January 3, 2018 for filing the first or final account
S/P	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
✓	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: skc
Reviewed on: 10/26/16
Updates:
Recommendation:
File 27- Marple